

USDA GRADUATE SCHOOL: PRE-RETIREMENT PLANNING
AUGUST 7, 8, & 9, 2001

Hosted by and held at the offices of:

**Southwestern Power Administration
One West Third Street, Suite 1400
Tulsa, OK 74103-3519**

A rewarding retirement does not just happen; it takes careful planning. Take this course to get the knowledge, materials, and tools needed to make fully informed decisions about your retirement benefits and prepare for your successful retirement. You will learn about Federal retirement benefits, social security, life and health planning, Thrift Savings Plan options, financial and estate planning. You will receive the companion *Retirement Planning Guide* as a supplement to normal course materials. This course is for Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS) employees within 10 years of retirement.

HOW YOU WILL BENEFIT

- Understand the key elements of the CSRS and FERS retirement systems, including CSRS Offset and TransFERS
- Compute and evaluate your basic retirement income
- Develop a financial plan with long-term benefits
- Comprehend the key elements of the Social Security system
- Know when Thrift Savings Plan withdrawals are permitted
- Understand how various tax and legal issues affect your benefits
- Arrange for your personal, health, and psychological concerns

WHAT YOU WILL LEARN

- T Retirement eligibility requirements
- T How to estimate retirement income
- T Steps in the retirement application process and forms required
- T Federal health and life insurance benefits
- T Social Security and Medicare
- T Financial, tax, legal, and estate planning
- T Use of leisure time, including volunteering and vocational activities
- T Implications of choosing where to live in retirement
- T Personal, health, and psychological impact of retirement benefits
- T Thrift Savings Plan

Cost of Course: \$206 per person

Class Schedule: 8:15 am - 4:45 pm

For registration and information, contact: Lynn King, 918-595-6617

**COMPLETE THE FORM ON BACK, AND RETURN TO LYNN KING AT
ABOVE ADDRESS NO LATER THAN JULY 3, 2001.**

**U. S. DEPARTMENT OF ENERGY
SOUTHWESTERN POWER ADMINISTRATION**

Request Form

Southwestern Power Administration will host retirement planning training open to Federal Executive Association members. Southwestern agrees to pay the training expenses and, subsequently, bill each respective agency the related cost for their employees in attendance.

Name: _____ Routing/Mail Code: _____
Last First M.I.

Course/
Conference Title: Pre-Retirement Planning

Begins: August 7, 2001 Ends: August 9, 2001

No. of College
Credit Hours or CEUs: 1.8

No. of
Duty Hours: 24

No. of Non-
Duty Hours: _____

Location of
Activity: Tulsa, OK

Vendor's Name and Mailing Address: Graduate School, USDA, Southwest Training Center
(Attach copy of brochure.) 1100 Commerce Street, Room 4F25, Dallas, TX 75242-0495

Tuition/Registration: \$206.00

THE FOLLOWING INFORMATION MUST BE SUBMITTED:

Agency Location Code: _____

Contact Person (to receive billing info): _____

Address, Phone, and FAX: _____

Note: Costs will be billed through the Treasury's Government Online Accounting Link System Order. Supporting documentation will follow via mail or fax.

NOTE: If you require any special accommodations at the training/conference site due to physical limitations / needs check here and the Training Office will contact you: _____

Employee's Signature (required): _____ Date: _____